Add and Remove a Lienholder

In Brief

In this Quick Card, a policyholder purchased a new vehicle. He would like to add the new vehicle to his existing Auto policy with the lienholder attached.

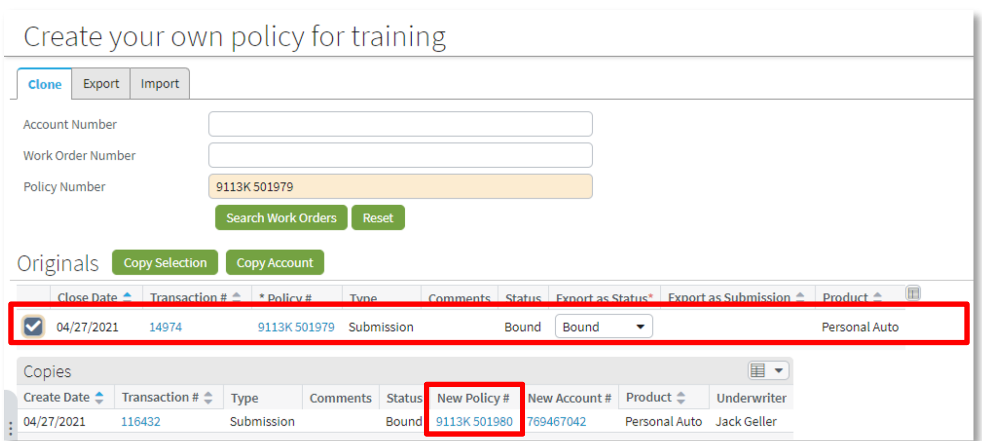
Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

IMPORTANT: This is a test environment. The next 7 steps are ONLY used in the VTO.

Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select "**Create your own policy for training**" from the drop-down menu.
2. Enter "9113K 501979" in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction #14974.



5. Click the **Copy Selection** button.
   Note: If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.
6. Scroll down, if necessary, to the **Copies** section.
7. Click the link in the **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.

Add a Lienholder

Summary screen

8. Click the **Actions** button.
9. Select "**Change Policy**" from the drop-down menu.

Start Policy Change screen

10. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept current date.
11. Click the **Next >** button.

Policy Info screen

12. Click the **Lienholder/Additional Interest** link.

Lienholder/Additional Interest screen

13. Click the **Add** button.
14. Select "**New Company**" from the drop-down list.
15. Select "**Lienholder**" from the **Third Party Type** drop-down list.
16. Enter "**788459**" into the **Loan Number** field.
17. Enter "**10012025**" into the **Expiration Date** field.

18. On the **Contact Detail** tab, enter the following information.
    - Enter "**U.S. Bank N.A.**" into the **Name** field.
    - Enter "**P.O. Box 3427**" into the **Address Line 1** field.
    - Enter "**Oshkosh**" into the **City** field.
    - Click the down arrow to the right of the **State** field. Select "**Wisconsin**" from the **State** drop-downlist.
    - Enter "**54903**" into the **ZIP Code** field.

19. Click the **OK** button.
20. Review the information in the *Personal Vehicle Additional Interests* section.
21. Click the **Quote** button.

Quote screen

22. Click the **Issue Change** button.
23. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, "*You Policy Change (#XXXX) has been bound.*"

Remove a Lienholder

Submission Bound screen

1. Click the **View your Policy (#XXXX)** link to access the same policy that was used for "*Add a Lienholder*".

Summary screen

2. Click the **Actions** button.
3. Select "**Change Policy**" from the drop-down menu.

Start Policy Change screen

4. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
5. Click the **Next** > button.

Policy Info screen

6. Click the **Lienholder/Additional Interest** link.

Lienholder/Additional Interest screen

NOTE: Be sure to select the vehicle on which a lienholder has been added, or the lienholder information will not display.

7. Review the **Additional Interest** details.
8. Select the checkbox to the left of the **Additional Interest**. In this example, select "**U.S. Bank N.A.**".
9. Click the **Remove** button.
10. Click the **Quote** button.

IMPORTANT: This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

Quote screen

11. Click the **Issue Change** button.
12. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, "*Your Policy Change (#XXXX) has been bound.*"